



# 09 Program Year CAPER

## GENERAL

**GRANTEE: City of Bloomington, Indiana**  
**CON PLAN PERIOD: 06/01/09 to 05/31/10**

### Executive Summary

The Executive Summary is not required. Provide a brief overview that includes major initiatives and highlights how activities undertaken during this program year addressed strategic plan objectives and areas of high priority identified in the consolidated plan.

PY 09 Action Plan Executive Summary:

### Summary of Resources and Distribution of Funds

#### 1) Summary of Resources and Distribution of Funds:

##### a. Provide a description of the resources made available

##### PY 09 CAPER #1a response:

Bloomington received \$ 847,075 in CDBG funding and \$ 37,844.39 in CDBG program income and \$ 718,951 in HOME funding and \$ 379,179.92 in HOME program income. The City of Bloomington also made available in local funds: \$180,000 for the Jack Hopkins Funds to assist local not-for-profits; \$ 80,000 for the Neighborhood Capital Improvement Fund (available to many target neighborhoods) and \$50,000 for Neighborhood Improvement Grants (available to all neighborhoods).

##### b. Provide the investment of available resources

##### PY 09 CAPER #1b response:

Please see chart in 2(a) below.

##### c. Provide the geographic distribution and location of investments

##### PY 09 CAPER #1c response:

See attached map.

d. Provide the number of families and persons assisted (including the racial and ethnic status of persons assisted)

PY 09 CAPER #1d response:

Program	AMI	Household Size	Race	Hispanic Y/N
Down Payment	61-80%	1	White	N
	61-80%	2	White	N
	61-80%	1	White	N
	61-80%	2	White	N
	61-80%	1	Black	N
Emergency Home Repair	0-30%	3	Black	N
	0-30%	1	White	N
	0-30%	2	White	N
	0-30%	1	White	N
	51-80%	3	White	N
	31-50%	1	White	N
	0-30%	1	White	N
	0-30%	1	White	N
	31-50%	2	White	N
	0-30%	3	White	N
	31-50%	1	White	N
	0-30%	3	White	N
	0-30%	1	White	N
	31-50%	1	White	N
	0-30%	1	White	N
Home Modification for Accessible Living	31-50%	2	White	N
	31-50%	1	White	N
	51-80%	3	White	N
	31-50%	1	White	N
	0-30%	1	Black	N
	31-50%	1	White	N
	51-80%	1	White	N
	0-30%	2	White	N
	31-50%	3	White	N
	31-50%	1	White	N
	31-50%	1	White	N
	0-30%	1	White	N
	31-50%	3	B/AA & W	N
Furnace & Insulation Program	31-50%	1	White	N
CDBG – Bloomington Housing Authority	40 households @ 0-30%	40 households	38 – White 2- Black	40 – N
CDBG Public Service				
Middle Way House	53 @ 0-30% 1 @ 31-50% 0 @ 51-80%		35 – White 13 – Black 2 - Asian	0 – Y 54 – N

	0 @ 80%+		1 – Am. I/Alaskan Native & White 1 – Nat. Haw/Other Pac. Islands 2 – Other	
Boys & Girls Club	61 @ 0-30% 5 @ 31-50%		34 – White 26 – Black 6 – Other	0 – Y 66 – N
Community Kitchen	975 @ 0-30% 162 @ 31-50% 17 @ 51-80%		920 – White 80 – Black 5 – Asian 10 – Am. I/Alaskan 2 – Native Hawaiian 31 – Am. I/AN & White 7 – Asian & White 13 – Black & White 1 – Black & Am. I/AN 85 – Other	48 – Y 1,106 – N
Hoosier Hills Food Bank	2,986 @ 0-30% 572 @ 31-50% 79 @ 51-80% 11 @ 80%+		3,000 – White 236 – Black 42 – Asian 40 – Am. I/Alaskan 7 – N. Hawaiian/other Pac 29 – Am. I/AN & White 2 – Asian & White 8 – Black & White 10 – Am. I/AN & Black 274 – Other	153 – Y 3,495 – N
Stepping Stone	11 @ 0-30%		6 – White 1 – Black 2 – Black & White 2 – Other	0 – Y 11 – N
Monroe County United Ministries	57 @ 0-30% 14 @ 31-50% 11 @ 51-80% 4 @ 80%+		39 – White 11 – Black 10 – Black & White 4 – Asian 22 – Other	13 – Y 73 – N
Mother Hubbard's Cupboard	2,986 @ 0-30% 572 @ 31-50% 79 @ 51-80% 11 @ 80%+		3,000 – White 236 – Black 42 – Asian 40 – Am. I/Alaskan 7 – N. Hawaiian/other Pac 29 – Am. I/AN & White 2 – Asian & White 8 – Black & White 10 – Am. I/AN & Black 274 – Other	153 – Y 3,495 – N
HOME				
Habitat for Humanity	51-80%	6	White	Y
	0-30%	5	White	Y
TBRA	0-30%	2	White	N

	0-30%	3	White	N
	0-30%	1	White	N
	0-30%	2	White	N
	0-30%	1	White	N
	0-30%	2	White	N
	0-30%	1	White	N
	0-30%	4	White	N
	0-30%	3	White	N
	0-30%	4	White	N
	0-30%	2	Black	N
	0-30%	2	White	N

e. Provide actions taken to affirmatively further fair housing

PY 09 CAPER #1e response:

See below.

f. Provide other actions indicated in the strategic plan and the action plan

PY 09 CAPER #1f response:

See below.

*You are encouraged to include maps in this description.  
Specifying census tracts where expenditures were concentrated and the percentage of funds expended in NRSAs or local target areas may satisfy this requirement*

#### General CAPER Narratives:

#### 2) Assessment of Three to Five Year Goals and Objectives

a) Describe the accomplishments in attaining the goals and objectives for the reporting period.

#### Assessment of year four goals and objectives:

Goal	Program/Agency	Amount Allocated	Amount Expended in PY 2009 (may include previous year funds & program income)	# of Units of Service/Housing Provided
Increase range of housing options & related services for persons w/	Abilities Unlimited Home Modification for Accessible Living	\$96,224	\$98,300	13

special needs.				
Improve the quality of affordable rental housing.	Bloomington Housing Authority –	\$115,790	\$115,790	40
Increase quality and available of affordable housing.	HAND Emergency Home Repair	\$71,224	\$76,393.48	15
Increase quality and availability of affordable housing.	Rockport Road Infrastructure Improvements		\$42,453.09	0
Increase quality and availability of affordable housing.	Habitat for Humanity-Lot acquisition	\$129,000	\$129,000	2
Improve quality/increase quantity of neighborhood facilities for low-income persons.	HAND – Curb and Sidewalk Program	\$30,000	\$2,267.45	Tract 6.00 – 6 Tract 1.00 – 1
Increase quality and availability of affordable housing.	Owner occupied rehabilitation.	\$50,000	\$107,068	2
Increase quality and availability of affordable housing.	Down payment and closing costs assistance		\$25,000	5
Improve the services for low/mod income persons.	Mother Hubbard's Cupboard Food Pantry	\$23,996	\$23,996	3,648
Improve the services for low/mod income persons.	Community Kitchen of Monroe County Free Meals Program	\$24,836	\$24,836	1,154
Improve the services for low/mod income persons.	Middle Way House Domestic Violence Shelter	\$17,638	\$17,638	54
Improve the services for low/mod income persons.	Hoosier Hills Food Bank Food Bank Program	\$24,964	\$24,964	3,648
Improve the services for low/mod income persons.	Boys & Girls Club of Monroe County		\$10,006	75
Improve the	Stepping Stones	\$17,638	\$17,638	11

services for low/mod income persons				
Improve the services for low/mod income persons.	Monroe County United Ministries	\$18,014	\$18,014	86
Increase the availability of affordable housing.	CHDO Set-aside – Middle Way House	\$107,843	\$177,080.40	0
Increase the availability of affordable housing.	Tenant Based Rental Assistance	\$45,000	\$29,448	12
Improve the quality of owner housing.	HOME Owner-Occupied Rehab	\$50,000	\$131,333	2
Increase the availability of affordable housing.	HOME Rockport Road (EverGreen Village)		HOME \$56,531.37 CDBG \$42,453.09	
Increase the availability of affordable housing	Habitat for Humanity-	\$129,000	\$129,000	2

- b) Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.

**\*If not using the CPMP Tool:** Use Table 2A, 2B, 3B, 1C, 2C, 3A

**\*If using the CPMP Tool:** Use Needs Tables, Annual Housing Completion Goals, Summary of Specific Annual Objectives. **(Use of these tables is sufficient, additional narrative is not required.)**

- c) If applicable, explain why progress was not made towards meeting the goals and objectives.

PY 09 CAPER General Questions #2c response:

Progress was made toward meeting the goals and objectives.

### 3) Affirmatively Furthering Fair Housing

- a) Provide a summary of impediments to fair housing choice.

PY 09 CAPER General Questions # 3a response:

The city of Bloomington coordinates fair housing activities through its Human Rights Attorney, Barbara McKinney and the Bloomington Human Rights Commission (BHRC). The Bloomington Human Rights Ordinance, among other things, prohibits discrimination in housing on the basis of sex, race, religion,

color, ancestry, sexual orientation, disability, gender identity, national origin or familial status. This past year, BHRC investigated five discrimination complaints. However, staff endeavors to provide educational services on this issue to the community. Over the past year, from June, 1, 2009 through May 31, 2010, McKinney answered numerous inquiries about housing issues from tenants, landlords, buyers and the general public. Questions covered a number of topics including accessible housing, familial status discrimination and sex discrimination. The goal is to attempt to resolve the problem without having to conduct formal investigation. Ms. McKinney also answers questions from sources outside the city limits. Quarterly reports are available through the Bloomington Human Rights Commission upon request.

HAND hosted three sessions of "R-101 Renting in Bloomington" to persons who were interested in learning about how to become a successful tenant. Referrals are made to R101 by the Bloomington Housing Authority, Shalom Community Center, Martha's House, among others. In 2006 The HAND department in partnership with McKinney, initiated a study to identify weaknesses in the provision of housing information to the Hispanic community. The study and resulting plan tracked how information is ordinarily provided to clients with limited English. The LEP (Limited English Proficiency) Plan was adopted in June of 2007 and demonstrates a number of suggested changes in policy, increased training and verification of language assistance contacts within the community. HAND also periodically holds a version of its Homeownership classes for Spanish speaking clients. This does not meet the requirements for assistance, but it provides them with basic information about homeownership. HAND also provides a modified version of its Citizens' Academy class in Spanish. This informs people what city government does and how to work with us to achieve desired goals.

The BHRC continues to publish a monthly newsletter, Rights Stuff, which frequently addresses fair housing within its coverage of new developments in civil rights. McKinney provides and distributes HUD fair housing brochures at many different venues throughout the year. The fair housing brochure is on the City's web site and it is also available in Spanish.

b) Identify actions taken to overcome effects of impediments identified in the jurisdiction's Analysis of Impediments.

The city of Bloomington has completed a review and revision of its regulatory impediments to affordable housing. This occurred as a topic of discussion during the comprehensive planning process conducted by the Planning Department. In February of 2007 Bloomington adopted its Unified Development Ordinance (UDO) and amendments were made in 2009. This document is the culmination of an inclusive public discussion process that started over 8 years ago with the Growth Policies Plan (GPP). Out of these extensive conversations, came a multi-faceted approach to encourage the development and sustainability of affordable housing in Bloomington. This is articulated in Section 20.05.009 AH-01 Affordable Housing Standards in the UDO.

One strategy in this ordinance section is to reduce the development cost of housing by providing waivers to development standards for affordable housing construction. Instead of requiring variances and public hearings, a developer can automatically anticipate reduced standards for an affordable housing project:

- Required on site parking is automatically reduced to a maximum of one space per dwelling unit when offsite parking is available
- Minimum lot area requirements may be reduced by 40%
- Minimum lot width may be reduced by 20%
- Side building setbacks may be reduced to 5 feet regardless of the number of stories
- Rear setbacks may be reduced to 15 feet

Another strategy in this ordinance section targets development fees. The city endorsed an interdepartmental policy of waiving fees when they are associated with affordable housing construction:

- Fees for the BZA and Plan Commission may be waived by the Planning Director.
- Right-of-way excavation permits may be waived by the Public Works Director.
- Sewer hook-on fees may be waived by the Utilities Service Board.

Within the UDO the City has stated a policy of supporting affordable housing by bearing the cost of sidewalks and street trees where deemed appropriate by the directors of Planning and Public Works.

Bloomington has long supported infill strategies that maximize the use of existing infrastructure and social services. On several occasions over the last 5 years, the Planning and Housing and Neighborhood Development Departments have cooperated on land development issues near downtown. These projects resulted in affordable subsidized housing designed to be compatible with the existing residential character. From the Policy 3 of the GPP: "...Develop a program that provides incentives (i.e. tax abatements or purchase/rehab assistance) for rehabilitating older housing stock in established neighborhoods for affordable housing." As an example, a 4 lot tract was purchased by the city, which subdivided one of the existing lots. The city then conveyed the 5 lots to three affordable housing developers. In this case one house was moved to the site, five were new construction, compatible in scale and design to the existing neighborhood.

Affordable housing projects participating in a program administered by the local, state or federal government must comply with the income eligibility requirements for the required time period for that program. The new zoning ordinance ensures parity of location, design, quality and proximity to amenities within any market rate development.

In addition, Mayor Mark Kruzan announced in his "State of the City" address, that he was forming an Inclusionary Zoning Committee to be co-chaired by the directors of the Planning and Housing and Neighborhood Development departments. This committee is being formed to look at the possibility of adding an inclusionary zoning requirement to the Unified Development Ordinance. This committee will begin work this fall.

Obstacles outlined in the Consolidated Plan 2005-2010 include access to affordable housing units and accessible affordable housing units, increase cost of developing/rehabilitating affordable housing units, risk of exposure to lead based paint, perceived impediments to participating in HAND programs, and fair housing issues. HAND has attempted to address these obstacles and needs by



providing funding to help develop and/or rehabilitate 1 housing unit this year and address the ever increasing cost of development/rehabilitation by increasing funds available for these projects. During the past year Housing and Neighborhood Development Department provided modifications to create accessible homes through a number of programs. Through the HMAL program, 16 clients were served during the time period with at total cost of \$90,000. Improvements and modifications included totally remodeled for wheel chair access in the bathrooms, including the shower, grab-bars for accessibility, and/or modifications for entry access such as a wheelchair ramp. The average client cost was \$7,500 from CDBG funding, which is a modest investment to allow someone to remain in their home and avoid institutionalization. Of the total number of HMAL projects provided in the CAPER report, the program served 8 individuals (0-30% AMI), 8 individuals (31-50% AMI) 3 individuals (51-60% AMI) and 6 individuals (61-80% AMI). HAND has assisted 87 households in minimizing or eliminating their risk of exposure to lead based paint since 2001 and continues to work with the local Monroe County Lead-Safe Coalition and the Indiana State Department of Health to help develop policies and procedures to eliminate the risk of exposure to lead based paint for Indiana's children.

- c) Identify actions taken to overcome effects of impediments identified in the jurisdiction's Analysis of Impediments.

PY 09 CAPER General Questions # 3b response:

See attached Analysis to Impediments to Fair Housing.

- 4) Address Obstacles to Meeting Underserved Needs

Identify actions taken to address obstacles to meeting underserved needs.

PY 09 CAPER General Questions # 4 response:

HAND continues in its efforts to lower the perceived barriers to participating in HAND programs by providing neighborhood services such as neighborhood grants (general fund) and informational/technical assistance. HAND, along with the City Planning Department, helps neighborhoods complete comprehensive neighborhood plans. This neighborhood planning process allows the neighbors to meet HAND staff members in a positive manner and helps them develop the direction of their neighborhood. To date, McDoel Gardens, Broadview, Prospect Hill and Green Acres neighborhoods have all completed plans. No new plans were done in 2010 and we do not expect to do any in 2011 as we work on implementing the goals of the approved plans. The Neighborhood Capital Improvement Program (general fund) is used to do capital projects that meet the goals of the approved plans. The first three neighborhoods are in HAND target areas.

HAND staff members also attend neighborhood association meetings, teach classes to groups such as the Bloomington Housing Authority's Family Self-Sufficiency Groups, and provides information to organizations such as the Bloomington Board of Realtors. All of these efforts are to help educate the citizens of Bloomington about HAND services and lower any perceived barriers to approaching HAND for assistance.

5) Foster and Maintain Affordable Housing

Identify actions taken to foster and maintain affordable housing.

PY 09 CAPER General Questions # 5 response:

The table below outlines the actions taken to foster and maintain affordable housing in Bloomington by program:

<b>Program</b>	<b>Action</b>
Owner-Occupied Rehabilitation Loan Program	A mortgage loan and promissory note is placed against the property of real estate that is either paid in payments over 15 years or is paid off at the time of sale to a new owner.
Purchase-Rehabilitation Program	A mortgage, promissory note and affordability covenants are placed against the real estate for a period of 15 years.
Down Payment & Closing Costs Program	A forgivable mortgage and note is placed against the real estate for a period of 5 years.
Homeownership New Construction	A mortgage, note and affordability covenant is placed against the property for a period of 15 years.
Rental Rehabilitation Loan Program	A mortgage, note and real estate covenant is placed against the property for a period of 10 or 20 years depending upon the amount of funds invested in the real estate. The real estate must be rented at HUD rent rates for the period of affordability to a household at or below 60% AMI.
Rental New Construction	A mortgage, note and real estate covenant is placed against the property for a period of twenty years. The real estate must be rented at HUD rent rates for the period of affordability to a household at or below 60% AMI.
Emergency Home Repair Grant	A grant to applicants, who are at or below 60% AMI, in need of repairs that affect the health and/or safety of their home.

6) Leveraging Resources

- a) Identify progress in obtaining "other" public and private resources to address needs.

PY 09 CAPER General Questions # 6a response:

In Fiscal Year 09, HAND received funding from the following sources to provide housing assistance:

- i. HUD Housing Counseling SuperNOFA -- \$37,480 for counseling services which helped leverage \$1,500 in private sources;
- ii. HAND received a grant from the Bloomington Housing Trust Fund in the amount of \$4,000 (June 2009) to be used as rental damage deposits for eligible successful graduates of R101- Renting in Bloomington.
- iii. The City of Bloomington allocated \$180,000 to social service agencies under the Jack Hopkins Council Social Service Grant program.
- iv. The City of Bloomington set aside \$85,000 in the Neighborhood Capital Improvement Program and \$55,000 in Neighborhood Grants to be allocated to meet specific neighborhood needs.
- v. The City of Bloomington allocated over \$1,872.37 and many city resources (including a sanitation truck for trash disposal, city trucks for pick-up, and staff members to work the clean-up) to assist two neighborhood with a significant neighborhood clean-up. The clean-ups removed 9.35 tons of trash, 36 tires, 2,059 pounds of metal (which was recycled) and over 110 pounds of hazardous materials.

b) Describe how Federal resources from HUD leveraged other public and private resources.

PY 09 CAPER General Questions # 6b response:

The public and private resources leveraged this year are as follows:

- The City of Bloomington uses general funds to for salaries for certain employees who do work on CDBG or HOME funded programs estimated at \$33,910.75 +/-.
- HAND's home purchase programs have leveraged \$455,000 in private mortgages.

c) Describe how matching requirements were satisfied.

PY 09 CAPER General Questions # 6c response:

Matching requirements:

Address	Type	Amount
12 <sup>th</sup> Street	Cash	\$18,353
12 <sup>th</sup> Street	Cash	\$18,351
12 <sup>th</sup> Street	Cash	\$50,000
12 <sup>th</sup> Street	Site Prep, Const. Mat., Donated Labor	\$74,823
2112 Susie Street	Foregone Taxes, Fees, Charges	\$2,400
1004 Thomson	Foregone Taxes, Fees, Charges	\$50
922 Orris	Foregone Taxes, Fees, Charges	\$25
* Sunny Slopes	Foregone Taxes, Fees, Charges	\$175
1722 Caradon Hill	Foregone Taxes, Fees, Charges	\$35
Total		\$164,212.00

## 7) Citizen Participation

### a) Provide a summary of citizen comments.

\*Please note that Citizen Comments and Responses may be included as additional files within the CPMP Tool.

#### PY 09 CAPER Citizen Participation # 7a response:

The Comprehensive Annual Performance Evaluation Report was posted on the City's web site on August 2, 2010. It was also made available at the Monroe County Public Library's Indiana Room and the City of Bloomington Housing and Neighborhood Development office and its availability was advertised in the Herald-Times on August 2, 2009 for public comment. The public heavily participates in the CDBG allocation process and provides on-going comments/suggestions through the Department's e-mail and the public meetings attended by HAND staff members.

Comments Received: This section to be completed at the end of the comment period.

The City of Bloomington uses a Citizen Advisory Council (CAC) for distribution of its CDBG funds. For this program year, the calendar of meetings was as follows:

<b>Date</b>	<b>Activity</b>
September 16, 2008	Applications available.
September 16, 2008	CDBG Informational Meeting (for applicants unfamiliar with the CDBG process).
October 3, 2008	Letter of Intent due.
October 14 <i>or</i> October 20, 2008	Mandatory applicant training on the CDBG application, CDBG requirements, and the Consolidated Plan.
November 17, 2008	Citizen Advisory Council (CAC) organizational meeting (training regarding CDBG requirements and consolidated plan are completed at this meeting). Physical Improvements Subcommittee plans its site visits.
December 5, 2008	Applications due.
December 8, 2008	Citizen Advisory Council meeting to pick up applications, review scoring system, and discuss calendar.
January 8 or January 13, 2009	Public Hearing for the applicants. Physical Improvements on the 8th, Social Services on the 13th. Public hearings are broadcasted on Bloomington Cable Access Television (CATS).
January 15 or January 20, 2009	Allocation recommendations meeting. Physical Improvements on the 15th, Social Services on the 20th.
February 3, 2009	CAC recommendations presented to the Redevelopment Commission for approval. (Public meeting.)
February 4, 2009	Recommendations approved by the Redevelopment Commission sent to the Mayor for approval.
February 25 and March 4, 2009	Recommendations approved by the Mayor sent to the City Council for final action. (Public meeting which is televised on Cable Access Television.)
June 1, 2009	Start of fiscal year.

The Public Hearings held for each group allows the applicants to make a small presentation and answer questions. These hearings are held in the City Council Chambers where the public is welcome to attend. The public hearings were shown on Cable Access Television (CATS). The presentation of the allocations to the Redevelopment Commission is a public meeting, but it is not broadcasted on CATS; however the City Council meetings are broadcasted on CATS.

- b) Describe how consideration was given to comments or views of citizens, received in writing or orally at public hearings, in preparing the CAPER.

PY 09 CAPER Citizen Participation # 7b response:

This section will be completed at the end of the comment period.

8) Institutional Structure

Describe actions taken during the last year to overcome gaps in institutional structures and enhance coordination.

PY 09 CAPER Institutional Structure # 8 response:

The staff of the Housing and Neighborhood Department administers federally funded projects and ensures compliance with the goals of the Consolidated Plan. HAND's 18 employees direct a variety of tasks associated with CDBG and HOME. Seven staff members have primary administration of these federal grants and are located in the housing division. Many of them have extensive experience in federally funded projects and programming. Four HAND staff members have received the HOME certification and two have received the HOME Administration certification. HAND also has four certified housing counselors; two of which are also certified in Reverse Mortgage Counseling. The State of Indiana recently adopted its own housing counseling certification process and all four are certified for pre-homeownership and two are certified for default. The City of Bloomington is a Certified Local Government for historic and the historic preservation program is administered from the HAND Department. The program manager for historic preservation is a certified planner (AICP) and received training in environmental review. We currently have five Lead Risk Assessors, one Lead Supervisor on staff and three Lead Renovators. Five staff members have received their ICC property maintenance code certification. For legal expertise, we have access to excellent attorneys such as Ms. McKinney who administers the city's Human Rights Division.

The department also works with 6 Boards and Commissions, many of which have the ability to provide various types of support to federal projects such as the BUEA, Housing Trust Fund, Redevelopment Commission, Historic Preservation Commission, or participate in the public input process which distributes the funding such as the Citizen's Advisory Council. HAND attends the Housing Network's monthly meetings. The Housing Network, which was recently organized as a not-for-profit, is made up of community agencies who meet regularly to better coordinate services to the homeless and to develop the Continuum of Care application.

A HAND housing counselor holds office hours at the Shalom Community Center; a day center that assists homeless persons by bringing together community resources in one location. She identifies appropriate housing and assists clients in completing housing applications to the Housing Authority or Martha's House emergency shelter, including declarations of homelessness which may increase their opportunities to find housing. The Shalom Community Center also hosts the services of the Social Services Administration, Martha's House, Planned Parenthood, Head Start, Ivy Tech Community College, Job Links, Monroe County Health Department, Indiana Legal Services, and the St. Vincent DePaul Society. The center provides personnel to assist with job searches and training on a daily basis.

## 9) Monitoring

- a) Describe actions taken to monitor the jurisdiction's performance in meeting objectives and outcomes set forth in its strategic plan.

PY 09 CAPER Monitoring # 9a response:

### **Community Development Block Grant:**

Physical improvement projects are monitored as follows:

1. Each project is required to fill out an application to be reviewed by the Citizen Advisory Council (CAC) for allocation recommendation. Applications include specific information regarding design of project, cost of project, and beneficiaries.
2. Successfully funded applications are required to sign a funding agreement outlining all of the requirements, regulations and standards.
3. A program manager from HAND will do site inspections periodically throughout the project.
4. Claims for payment are filed, with appropriate documentation, with the program manager. The program manager reviews the claim and approves it for payment.
5. Davis-Bacon and affirmative action monitoring is completed by the contract compliance officer who is a staff attorney in the City of Bloomington Legal Department.
6. The HAND program manager will receive copies of all reports from the Monroe County Building Department, City of Bloomington Planning Department, and/or City of Bloomington Fire Department for compliance with all state, city and county regulations. If any other inspections are required or completed, a copy of that report must also be supplied to the program manager.
7. The HAND program manager will also monitor for beneficiary compliance. Depending upon the project and the agency, monitoring may occur both before and after the project.

Social service programs are monitored as follows:

1. Each project is required to fill out an application to be reviewed by the Citizen Advisory Council (CAC) for allocation recommendation.

Applications include specific information about the program funded and the beneficiaries.

2. Successfully funded applications are required to sign a funding agreement outlining all of the requirements, regulations and standards.
3. A program manager from HAND will receive and review all claims for payment. Claims for payment must include beneficiary information.
4. The HAND program manager will monitor for compliance prior to the end of the fiscal year. If needed, monitoring may occur at more regular intervals.

### **HOME Projects:**

There are two categories of HOME projects; HOME projects administered by HAND and HOME projects administered by CHDOs, Non-Profits, or For-Profit entities. HOME projects administered by HAND are monitored as follows:

1. HAND operates a number of housing projects that are funded by HOME. Each client is required to fill out an application to determine eligibility. Each application is processed by the HAND program manager/loan officer to determine income and residency eligibility and project feasibility.
2. The HAND program manager/construction project manager will inspect each project to determine project costs and requirements.
3. Upon approval of a project, funding agreements and/or mortgages are signed by applicant outlining terms and conditions of funds.
4. The HAND program manager/construction project manager will monitor the progress of the project, ensuring compliance with all building codes and HAND construction standards.
5. Claims for payment are reviewed and approved by the program manager/construction project manager monitoring the project.
6. A final inspection at the completion of the project must be completed prior to the final payment. This inspection also includes obtaining the certificate of occupancy from the Building Department.

HOME projects administered by CHDO's, non-profits or for-profit entities are monitored as follows:

1. Applications for funding must include specific details about the project, costs and beneficiaries.
2. Successfully funded applications are required to sign a funding agreement, mortgage and/or covenants outlining all of the requirements, regulations and standards.
3. A program manager from HAND will do site inspections periodically throughout the project.
4. Claims for payment are filed, with appropriate documentation, with the program manager. The program manager reviews the claim and approves it for payment.
5. Davis-Bacon and affirmative action monitoring, if applicable, is completed by the contract compliance officer who is a staff attorney in the City of Bloomington Legal Department.
6. The HAND program manager will receive copies of all reports from the Monroe County Building Department, City of Bloomington Planning

Department, and/or City of Bloomington Fire Department for compliance with all city and county regulations. If any other inspections are required or completed, a copy of that report must also be supplied to the program manager.

7. The HAND program manager will also monitor for beneficiary compliance. Depending upon the project and the agency, monitoring may occur both before and after the project.

HOME rental projects are monitored as follows:

1. Each project is monitored as described above; however, on an annual basis each project is monitored for beneficiary compliance.
2. Documentation is provided to the program manager to ensure compliance with the funding agreement/mortgage/covenants. This documentation shows the number of assisted units, income level of residents, utility allowances, and units receiving Section 8 or units receiving TBRA, if applicable.
3. Program manager will contact tenants to verify information provided.
4. Physical inspections of HOME units are handled through HAND's comprehensive rental inspection program. Those inspections verify the physical condition of each unit and insure that they are in compliance with HOME standards and the City's Housing and Property Maintenance Code.

Tenant Based Rental Assistance projects are monitored as follows:

1. TBRA projects are governed according to their funding agreements.
2. On an annual basis, the HAND program manager meets with the administrator of each TBRA program. The administrator provides the program manager with information program policy and procedures, outreach, participant selection, unit information (including lead-based paint visual and HQS inspections), tenant income documentation, tenant leases, and, if applicable information regarding required self-sufficiency programming.
3. The HAND program manager contacts the tenants to verify information.
4. Claims for payment must be approved by the HAND program manager and must include applicable documentation.

### **Monitoring Results and Improvements:**

As most projects are monitored during the project/program process, monitoring results show that projects are in compliance. Social Service allocations are monitored during and at completion and are found to be in compliance.

- b) Describe how and the frequency with which you monitored your activities, including subrecipients (including sponsors or administering agents).

PY 09 CAPER Monitoring # 9b response:

CDBG:



- Physical Improvement projects are monitored for compliance throughout the project and at completion. Depending upon the project, legal documents may be recorded against the property for a period of time to ensure compliance.
- Social Service allocations are monitored throughout the funding year and at year end for compliance.

HOME:

- CHDO projects are monitored throughout the project and at completion for compliance.
- HOME funded housing projects are monitored throughout the project and at completion for compliance. Mortgages, notes and/or affordability covenants are recorded against the real estate to ensure compliance for the affordability periods.

- c) Describe the results of your monitoring including any improvements made as a result.

PY 09 CAPER Monitoring # 9c response:

All projects and allocations were found to be in compliance.

- d) Describe actions taken to insure compliance with program requirements, including requirements involving the timeliness of expenditures.

PY 09 CAPER Monitoring # 9d response:

All projects are monitored throughout the project or allocation period for compliance and at completion/year end. Appropriate security documents are recorded against the property to ensure compliance with affordability periods. For construction project, each contract has a required start up period and end period to ensure timeliness of expenditures. All allocations have a period within which all funds must be expended.

- e) Describe steps/actions taken to ensure long-term compliance with housing codes, including any actions or on-site inspections undertaken during the program year.

PY 09 CAPER Monitoring # 9e response:

All projects are monitored throughout the construction period to ensure that they are in compliance with all local building codes. All projects are also inspected for code compliance by the Monroe County Building Department. In addition, HAND's rental inspection program requires that all rental units located within the City limits are inspected on a 3-5 year rotation for compliance with the City of Bloomington's Property Maintenance Code. All HOME funded rental projects are inspected on a 1 -3 year rotation in addition to the inspection required for the property maintenance code. HAND also inspects rental units on complaint basis. This inspection process insures that all tenants have a safe and habitable place to live.

- f) What is the status of your grant programs?  
i) Are any activities or strategies falling behind schedule?

- ii) Are grant disbursements timely?
- iii) Do actual expenditures differ from letter of credit disbursements?

PY 09 CAPER Monitoring # 9f response:

- i. There are no activities or strategies falling behind schedule at this time.
- ii. Yes, grants are disbursed timely.
- iii. No.

10) Antipoverty Strategy

Describe actions taken during the last year to reduce the number of persons living below the poverty level.

PY 09 CAPER Antipoverty Strategy #10 response:

As noted in the Consolidated Plan, the Bloomington poverty rate for 2008 was 20.7% ([www.census.gov/cgi-bin/saige/saige.cgi](http://www.census.gov/cgi-bin/saige/saige.cgi)) which is higher than the state average of 12.9%. The median household income in 2008 was \$28,730 which was more than \$19,000 less than the median income for the state of Indiana of \$47,966 ([www.city-data.com/city/Bloomington-Indiana.html](http://www.city-data.com/city/Bloomington-Indiana.html)). The estimated median house value in 2008 was \$167,500 which is above the median house value of \$125,200 for the state ([www.city-data.com/city/Bloomington-Indiana.html](http://www.city-data.com/city/Bloomington-Indiana.html)). Median rent for Bloomington (MSA) was \$712 ([http://factfinder.census.gov/servlet/GCTTable?\\_bm=y&-geo\\_id=01000US&-box\\_head\\_nbr=GCT2514&-ds\\_name=ACS\\_2008\\_3YR\\_G00\\_&-lang=en&-mt\\_name=ACS\\_2008\\_3YR\\_G00\\_GCT2514\\_US25T&-format=US-25T](http://factfinder.census.gov/servlet/GCTTable?_bm=y&-geo_id=01000US&-box_head_nbr=GCT2514&-ds_name=ACS_2008_3YR_G00_&-lang=en&-mt_name=ACS_2008_3YR_G00_GCT2514_US25T&-format=US-25T)) which is higher than state median rent of \$670. HAND attempts to fill this substantial gap with an effort to educate the public about housing issues, provide coordination of supporting programs and contact information for partnering social service agencies. HAND provides incentives for success eligible graduates of both the Home Buyer's Club (down payment & closing cost assistance – CDBG/HOME) and R101- Renting in Bloomington (security deposits – general fund).

HAND supports a variety of social service agencies which provide services to the neediest members of the community. The Housing Network, an organization described elsewhere, has a key role in identifying gaps in services by annually monitoring homeless statistics and creating community wide goals.

The Shalom Community Center will be moving this summer to their new location on South Walnut Street. The Center offers basic needs such as showers, laundry, telephones and mailboxes. Shalom Center serves breakfast and serves as a clearing house and point of contact for local agencies. In 2007 they distributed 2,341 bus tickets, 170 gas vouchers. 131 individuals received help with utility bills. (93% of those seen make 30% or less AMI). Assistance with seeking and obtaining jobs is a key element in ending the poverty cycle. Job Link met with nearly 897 people at the Shalom site last year. The Family Homeless Prevention Program placed 82 families in permanent or specialized housing. They also said they stabilized 188 families

(stabilized not defined) A typical monthly calendar of events last year includes visits by HAND, Head Start, New Leaf New Life, Veteran's Administration, Job Links, Positive Link, Social Security administration, PATH, and St. Vincent de Paul Society.

Volunteers in Medicine of Monroe County opened on April 23, 2007 with 1822 enrolled patients and has a current enrollment of nearly 4,741 patients. Approximately 40 percent of the 12,000 low income individuals in Monroe and Owen counties are now enrolled as patients at Volunteers in Medicine of Monroe County. A significant part of the clinic's programming are social services. There is a full-time social work coordinator who is able to connect patients with other service agencies in the area in order to meet their needs in food, housing, financial aid, etc. as well as coordinate the eligibility process. They moved in February 2009 to a new facility that increased their capacity by 20%.

HAND continuing partnership with Habitat for Humanity assisted in the completion of two homes for families both of which were below 50% area median income. HAND has an accepted Offer to Purchase for two lots on the southeast side of Bloomington and is negotiating for possibly seven more lots just block from downtown for Habitat. Purchasing a home, especially through a program such as Habitat, can help stabilize a person's housing expenses and help them move beyond poverty.

## Self-Evaluation

- 11) Provide an evaluation of accomplishments. This evaluation must include a comparison of the proposed versus actual outcomes of each outcome measure submitted with the strategic plan and explain, if applicable, why progress was not made toward meeting goals and objectives.

***\*If not using the CPMP Tool: Use Table 1C, 2C, 3A***

***\*If using the CPMP Tool: Use Summary of Specific Annual Objectives.***

**(The following IDIS Reports will be reviewed to determine satisfaction of this requirement: PR03, PR06, PR23, PR80, PR81, PR82, PR83, PR84, PR85)**

Consider the following when providing this self-evaluation:

- a) Describe the effect programs had in solving neighborhood and community problems.
- b) Describe the progress made in meeting priority needs and specific objectives.
- c) Describe how activities and strategies made an impact on identified needs.
- d) Identify indicators that best describe the results of activities during the reporting period.
- e) Identify barriers that had a negative impact on fulfilling the strategic and overall vision.

- 12) Identify whether major goals are on target and discuss reasons for those that are not on target.

- 13) Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

PY 09 CAPER Self-Evaluation # 11, 12, 13 response:

11) HAND has a number of programs to assist in solving neighborhood and community problems. These include:

a) Programs designed to meet specific neighborhood and community problems include:

(1) Neighborhood concerns:

- Owner-Occupied Rehab – provided stabilization of existing owner-occupied housing in established neighborhoods. Improves the overall housing stock for the neighborhood.
- Purchase-Rehab – provides stabilization of existing housing in core neighborhoods for new homeowners. This program can also be used to flip rental properties to owner-occupancy.
- Emergency Home Repair – provides emergency assistance to existing owner-occupied housing for households at or below 60% area median income.
- Home Modification for Accessible Living – provides accessibility improvements to either owner-occupied or rental housing which allows established neighborhood members to remain in their homes.
- Rental Inspection Program – this program requires that all rental properties within the city limits be maintained to a minimum standard as outlined by the Property Maintenance Code (Bloomington Municipal Code 16). HAND conducted 6,548 regular cycle inspections in 2008. Every unit is cycled on a 3, 4 or 5 rotation depending upon several factors.
- Neighborhood Plans and Neighborhood Capital Improvement Program (General Fund) – The City's Planning and Housing & Neighborhood Developments receive applications from neighborhoods interested in doing a strategic plan for their areas. Goals from the approved plans are then eligible for funding through the Neighborhood Capital Improvement Program. This past year, funding was dedicated the Country Club sidepath. Funding will be used to assist eligible households hook up to the new sewer line that was installed as part of this project.
- Neighborhood Improvement Grant Program (General Fund) – HAND accepts applications from neighborhoods who wish to do various physical improvements in their neighborhoods. Projects this year include benches & sign for the Housing Authority, neighborhood sign for Broadview, playground equipment for Bryan Park, seating, landscaping & fountain for Elm Heights, and a table, steps & landscaping for Prospect Hill.
- Small & Simple Grant Program (General Fund) – HAND accepts applications from neighborhoods who wish to promote neighborhood community building activities. These applications are generally to build or enhance a physical improvement, a one-time events such as a special celebration, or training sessions/educational campaign. Approved applications for this year traffic calming landscaping, publishing a neighborhood newsletter & mailing, neighborhood party, and National Night Out. Last year HAND launched a new "get to know your neighbor campaign" by providing funding for neighborhood ice cream gatherings which was well received and is being duplicated in 2010.

(2) Community concerns:

- The City allocates the full 15% allowable under Community Development Block Grant to be used by social service agencies for operating expenses. Grants are accepted each year by agencies and allocations are made by the Citizen Advisory Council based on a number of things including community need.
- HAND accepts applications from social service agencies who wish to apply for funding under CDBG to do physical improvements to their facilities in order to improve their efficiencies. No funds were allocated to this effort in FY 2009; however in 2010, funds were allocated to renovate the Community Kitchen's new facility.
- The City allocates funding from the General Fund to social service agencies to help them improve their efficiencies through the Jack Hopkins Council Social Service Grant Program. The 2009 allocation was \$180,000 and the 2010 allocation was \$200,000.
- HAND is a HUD certified Housing Counseling Agency and provides housing counseling to the community in the areas of default, pre-purchase, rental, homeless, and reverse mortgage. HAND provides a host of classes through this program including the Home Buyer's Club, "This Whole House," and R-101 – Renting in Bloomington.
- HAND provides technical assistance to local non-profits and other entities in the areas of construction, lead based paint, accessibility (ADA) and a host of other related topics.

b) Priority Needs & Specific Objectives:

(1) Objective 1: Create opportunity for affordable homeownership

Activity	Units Completed
Provide subsidy and construction loans to for-profit and non-profit developers for the construction and/or rehabilitation of affordable owner-occupied homes.	2
Provide homeowners direct assistance to purchase and rehabilitate existing homes through HAND's Purchase-Rehab/Acquisition-Rehab programs.	0
Provide homeowners direct assistance to purchase homes through HAND's Down Payment & Closing Cost Assistance Program.	5
Provide technical assistance and support to potential first time homebuyers through HAND's Home Buyer's Club.	95

(2) Objective 2: Encourage neighborhood stabilization

Activity	Units Completed
Provide rehabilitation and historic renovation assistance to existing eligible homeowners.	0
Provide rental inspections to maintain the integrity of rental properties (General Fund).	6,548
Provide existing homeowners with assistance to make emergency home repairs that threaten the health and safety of the occupant or the integrity of the structure.	15
Provide infrastructure assistance (sidewalks, street improvements, water/sewer).	1,350 linear ft.

Provide neighborhood assistance through the Neighborhood Improvement Grant or the Small & Simple Grant	8
Provide neighborhoods with neighborhood clean-up grants (General Fund)	2

(3) Non-Homeless Special Needs Objectives

Activity	Units Completed
Objective 1 – Provide assistance to the elderly or disabled to allow them to remain in their homes (HMAL).	13
Objective 2 – Provide financial assistance to low-income individuals and families in need of Housing (TBRA).	12

- c) The HAND Department is very active in the community at large and receives a lot of input from citizens regarding the needs of the community. HAND members:

- Attend neighborhood association meetings to discuss our various neighborhood grant programs, concerns of the neighborhood (such as Title 6 – Weeds & Trash which is enforced by HAND), potential ideas of the neighborhood (such as the creation of a conservation district which is part of the Historic Preservation Commission, a commission of HAND), etc.
- Belong to various committees such as the United Way Allocations Committee, the Housing Network, as well as participate in community groups such as the Emergency Shelter group, etc.
- HAND staffs a number of citizen committees such as the Citizen Advisory Council for CDBG, the Redevelopment Commission, Board of Housing Quality Appeals, Historic Preservation Commission, Bloomington Urban Enterprise Association Board of Directors, the Housing Trust Fund Advisory Board, and the Citizen Advisory Council for Neighborhood Grants.

Through our various interactions, the HAND Department receives significant citizen input on community needs. Our programs evolve to meet those needs. This year, our impact includes installation of sanitary sewer in an area of failing septic systems, creating pedestrian linkages in various neighborhoods, housing stock has been increased and improved, historic commercial buildings in the downtown have been renovated and reused as viable businesses, houses have been modified to allow for accessibility, social service agencies have been provided with funds to meet the needs of their clients, and learning opportunities have been provided to meet citizen needs.

- d) Indicators include Service Community Assessment of Needs, information provided by United Way, performance evaluations of social service agencies who have been allocated funds, Census information, surveys, and information tracking systems such as Rentpro (the city's rental inspection database) and Reqpro (the city's complaint database).

- e) Barriers to fulfilling strategic vision for the community include availability of funding, availability of buildable land, cost of housing in relation to income, environmental concerns, and perception of the economic forecast.

12) All goals are on target at this time.

13) HAND is always evaluating our services and programs and making adjustments based on our interaction with the community. The Redevelopment Commission, a five member commission appointed by the Mayor and City Council, review and approve our new program development & guidelines, revised program guidelines, and development actions. They also review and approve Tax Increment Financing (TIF) funded projects which are generally infrastructure projects designed to improve an area of development. The Redevelopment Commission provides us with invaluable information about how to improve our activities to meet community needs more effectively.

## HOUSING

### Affordable Housing

14) Evaluate progress in meeting its specific affordable housing objectives, including:

- a) Comparison of proposed numeric goals (from the strategic plan and annual plan) with the actual number of extremely low-income, low-income, and moderate-income renter and owner households assisted during the reporting period.

**\*If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)

**\*If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER Affordable Housing # 14a response:

See attached Tables.

- b) Report the number of households served meeting the Section 215 requirements of affordable housing (essentially meeting the definitions in 24 CFR 92.252 and 92.254 for renters and owners, respectively).

**\*If not using the CPMP Tool:** Use Table 3A

**\*If using the CPMP Tool: Annual Housing Completion Goals  
(Use of this table is sufficient no additional narrative is required)**

- c) Describe efforts to address worst case needs (defined as low-income renters with severe cost burden, in substandard housing, or involuntarily displaced).

PY 09 CAPER Affordable Housing # 14c response:

Worst-case housing needs are addressed mainly through the Emergency Home Repair Grant and Home Modification for Accessible Living Grant programs. These grant programs deal with emergency health and safety issues (E.H.R.) and disability needs (HMAL). Last fiscal year, HAND did 28

E.H.R. and HMAL projects for a total investment of \$174,693.48. These repairs/modifications included, but are not limited to, roof repairs, electrical repairs, furnace repairs, construction of ramps, and modifications of bathrooms. The City's Rental Inspection program also requires that all rental properties within the City limits be inspected on a 3-5 year rotation or by complaint. In 2009, HAND inspected over 7,000 rental units. This enables the City to ensure that all tenants have a safe and habitable place to live. For worst-case housing needs for individuals/families that are not structural, a HAND housing counselor has "office hours" at the Shalom Community Center, a day center for people experiencing homelessness. These cases are often individuals/families that have lost their housing or are at serious risk of losing their housing. She works with the Bloomington Housing Authority and other housing providers to help them secure housing. In addition, HAND offers a class called R101 – Renting in Bloomington to teach class participants on how to be a good renter. Successful graduates can apply for damage deposit loans. These loan funds were provided by an outside grant from the Monroe County Community Foundation.

- d) Description of efforts to address the accessibility needs of persons with disabilities.

PY 09 CAPER Affordable Housing # 14d response:

HAND works in conjunction with Abilities Unlimited to administer a program called Home Modification for Accessible Living. This program, funded with CDBG, provides structural modifications to fit the accessibility needs of the persons in the household served. This fiscal year, HAND assisted 13 households.

## **Public Housing Strategy**

- 15) Describe actions taken during the last year to improve public housing and resident initiatives.

PY 09 CAPER Public Housing #15 response:

The Bloomington Public Housing Agency continues to achieve a High Performance rating. The Housing Authority continues its substantial remodeling of their units. This remodeling will help them stay competitive within the surrounding affordable apartment market.

The Assistant Director of HAND is a Bloomington Housing Authority Board Member and she is able to offer advice and suggestions to the Board and agency on ways HAND and BHA can partner to better serve the low income community. A HAND staff member also attends "Agency Meetings" to match tenants with city-wide available services. HAND is a major supporter of National Night Out through our Neighborhood Services Programs (General Fund). This past fiscal year, the Citizen Advisory Council allocated funds to renovate 40 units.

Under the Section 8 Home ownership program Housing Authority tenants are referred to the HAND Homebuyer's club, where, after completion of the curriculum, they can become eligible for down payment and closing cost assistance. HAND's TBRA funds, established in 1992, are earmarked to assist



people on the PHA and SCAAP waiting list for Section 8 housing. HAND assisted 12 households in the last program year.

## **Barriers to Affordable Housing**

16) Describe actions taken during the last year to eliminate barriers to affordable housing.

### PY 09 CAPER Barriers to Affordable Housing #16 response:

The Consolidated Plan notes several continuing obstacles to obtaining affordable housing in Bloomington. The tendency to suffer high rents and house payments are due to market pressures associated with living in a large state university town. HAND has either initiated or continued the following responses to these conditions:

1. Down payment and Closing Cost - HAND's Home Buyer Education classes met three times throughout the year. Each class is 14 hours long and presents a comprehensive view of purchasing and owning a home. Three sessions were held on weekends and one was a 7 week course held on weeknights. Through this program, successful income-qualified graduates are eligible for down payment and closing cost assistance. The Homebuyers Club hosted a total of 98 students who completed the course. Seven were awarded down payment and closing costs of \$5000. Candidates were advised of the Federal Home Loan Bank programs which matched many of these loans. HAND down payment loans are forgiven over 5 years.
2. Security Deposits - The Consolidated Plan discussion revealed a population of potential renters who have difficulty saving deposits, or who have an eviction history. In 2005 HAND developed "R 101" a class in how to be a more successful tenant. Successful graduates are eligible to apply for security deposit loans. The security deposits are funded through a grant from the Bloomington Housing Trust Fund housed at the Community Foundation of Monroe County.
3. Rents in Bloomington persist in being extremely high because of the student market. HAND has responded by providing TBRA assistance to families and individuals on the Section 8 Waiting List since 1992. HAND provides assistance until the clients either receive vouchers or find other permanent housing. In the last year, all households assisted with TBRA were at or below 30% AMI.

The Unified Development Ordinance (UDO) became effective on February 12, 2007 and was amended in 2009. This ordinance created a more predictable development path for developers. The UDO includes Affordable Housing Standards and outlines the possible incentives for development of such housing. Those incentives include the waiver of fees, sidewalk construction assistance, reduced parking requirements, and reduced bulk requirements.

## **Lead-based Paint**

- 17) Describe actions taken during the last year to evaluate and reduce lead-based paint hazards.

PY 09 CAPER Lead-based Paint #17 response:

The City of Bloomington Housing and Neighborhood Development Department has been diligent in its work to eradicate lead hazards from the homes of the families we serve. HAND currently has four risk assessors, three lead renovators and one lead supervisor on staff. Since 2001, HAND has completed 92 risk assessments for potential HAND programs, four (4) in this last fiscal year.

HAND received a grant from the Indiana Department of Health to conduct a study on lead safe cleaning practices. Work on the first phase of the Maternal and Children's Health Grant was completed in October 2005. The grant was designed to promote education about lead dust hazards and to evaluate the effectiveness of recommended cleaning practices. Visual assessments were completed on one hundred participating homes. Subsequently, homeowners were informed about lead dust hazards and ways to minimize them in the home. Twenty homes were monitored for six months to determine if recommended cleaning practices were effective in reducing lead dust hazards. A risk assessment was conducted at the beginning and end of the study for each house. The results were compared to determine if the cleaning practices were effective. Overall results showed that use of recommended cleaning practices during regular cleaning cycles reduces lead dust hazards. Phase 2 of the grant ran from October 2005 to October 2006 and management of the grant shifted to Bloomington Hospital. HAND assisted with Visual and Risk Assessments as needed during this phase. HAND also taught three Lead Safe Cleaning Classes as part of this ongoing grant.

HAND has been involved in Indiana lead policy discussion, assisting with the creation of a standardized Risk Assessment report to be available for statewide use. This work is in conjunction with the State's Lead Safe and Healthy Homes Task Force. HAND has assisted in the development and presentation of the Indiana Lead Conference host by IKE (Improving Kid's Environment) in the pasts and has presented a topic of discussion at the conference in previous years. HAND is also a member of the Monroe County Lead-Safe Coalition and works to educate the citizens of Bloomington on lead hazards and how to minimize exposure to them.

## HOMELESS

### Homeless Needs

- 18) Identify actions taken to address needs of homeless persons.

PY 09 CAPER Homeless Needs #18 response:

On a regular basis as well as by referral, HAND counselors meet with clients face-to-face at the Shalom Center, a day center for homeless individuals/families. Counselors

determine the housing needs of the individual/family and what steps must be taken to find shelter for the client. Referrals are made to appropriate housing providers; examples are the local emergency shelters, Housing Authority, and private landlords. Subsidized housing is generally recommended for all clients. Letters of homelessness are provided to clients to help escalate their application for Public Housing/Section 8. Counselors also refer clients to other social service agencies in Bloomington depending on their unique needs. All referrals are made to help the client stabilize their situation.

HAND also works with the homeless shelter, Martha's House, to provide housing information and budget, credit and leases and contracts classes. HAND offers classes in these areas on site at Martha's House. These are basic classes that stress both income and expenses as integral issues of homelessness. A HAND staff member sits on the Board of Martha's House to help coordinate needed services for the clients of the shelter.

In November 2009, the City provided funding for the Inter-Faith Winter Shelter and donated space in a community building to house it for one night a week. The Inter-Faith Winter Shelter operated from November 2009 to March 2010. It is scheduled to reopen in November 2010.

- 19) Identify actions to help homeless persons make the transition to permanent housing and independent living.

PY 09 CAPER Homeless Need #19 response:

Through the HAND Housing Counseling program, housing counselors work with the homeless to help them achieve their goals of self-sufficiency. Further, the City allocates both CDBG and General Fund resources to agencies that help promote self-sufficiency for this population. Last year, the following agencies received funding:

Agency – Program	Amount
Community Kitchen – Food Program (CDBG)	\$24,836
Hoosier Hills Food Bank – Food Program (CDBG)	\$24,964
Mother Hubbard's Cupboard (CDBG)	\$23,996
Middle Way House (CDBG)	\$17,638
Stepping Stones (CDBG)	\$17,638
Community Kitchen – Backpack Buddies (general fund)	\$1,005
Inter-Faith Winter Shelter (general fund)	\$5,000
Martha's House, Inc. (general fund)	\$24,557
Middle Way House, Inc. (general fund)	\$10,500
Mother Hubbard's Cupboard (general fund)	\$28,650
Shalom Community Center (general fund)	\$18,000
Stepping Stones (general fund)	\$20,000
Total	\$216,784

- 20) Identify actions taken to implement a continuum of care strategy for the homeless and new Federal resources obtained during the program year, including from the Homeless SuperNOFA.

**\*If not using the CPMP Tool:** Use Table 3B, 1C

**\*If using the CPMP Tool:** Use Needs/Homeless, Needs/Non-Homeless, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER Homeless Needs #20 response:

The Region 10 Housing Network meets monthly to oversee and coordinate issues for the homeless. They have named a subcommittee, composed of member organizations, to write the Continuum of Care application on a yearly basis. The subcommittee meets monthly. The Network also organizes the Homeward Bound Walk and works with IHCD to coordinate state mandates and funding. The annual Point in Time count of the homeless is also a Housing Network activity.

The Housing Network has incorporated and hopes to seek funds to create a 10-year plan to end Homelessness. They actively helped to organize the HPRP program for Region 10, selecting Centerstone as the lead agency. They welcomed the new VASH (Veteran's Assistance) program in to their organization this year and have increased participation by faith based providers. The following information is summarized from the 2009 Continuum of Care application. For 2010 Positive Link was awarded an SHP grant of 228,274. This is a new program funded this year all others were funded as return applicants.

Shelter Plus Care	SCCMHC/Madison Project	10 units	\$59,328
Transitional Housing	Amethyst House WIT		\$261,163
Transitional Housing	SCCMHC/CBH Hoosier House		\$507,862
Transitional Housing	YSB Stepping Stones		\$77,307
Permanent Housing	Martha's House (Bridges)		\$267,586

## **Specific Homeless Prevention Elements**

- 21) Identify actions taken to prevent homelessness.

PY 09 CAPER Specific Homeless Prevention #21 response:

HAND provides funding for social service programs that provide homeless prevention services, such as Community Kitchen of Monroe County for prepared meals, Monroe County United Ministries and Mother Hubbard's Cupboard for food, and the Shalom Center for services such as access to Indiana Legal Services, Social Security Administration, Job Links, Planned Parenthood and Office of Family and Children. See above chart above in question #19. HAND also provides a housing counselor to the Shalom Center once a week to do counseling with persons at risk of

homelessness or experiencing homelessness. Bloomington had a wealth of programs to help its citizens in need.

- 22) Identify actions to address emergency shelter and transitional housing needs of homeless individuals and families (including significant subpopulations such as those living on the streets).

PY 09 CAPER ESG # 22 response:

The Housing Network, of which HAND is a member, coordinates services for homeless individuals and families. This network includes agencies such as Middle Way House (domestic violence shelter), Stepping Stones (youth shelter), Bloomington Housing Authority (assisted rental units), Martha's House (individual shelter), Amethyst House (shelter for those recovering from drug and alcohol abuse), as well as Indiana Legal Services and other supportive services. This Network creates the application for the Continuum of Care.

### **Emergency Shelter Grants (ESG)**

- 23) Assessment of Relationship of ESG Funds to Goals and Objectives

- a) Evaluate progress made in using ESG funds to address homeless and homeless prevention needs, goals, and specific objectives established in the Consolidated Plan.

**\*If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)

**\*If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER ESG Evaluate Progress # 23a response:

Not applicable.

- b) Detail how ESG projects are related to implementation of comprehensive homeless planning strategy, including the number and types of individuals and persons in households served with ESG funds.

PY 09 CAPER ESG # 23b response:

Not applicable.

- 24) Matching Resources

- a) Provide specific sources and amounts of new funding used to meet match as required by 42 USC 11375(a)(1), including cash resources, grants, and staff salaries, as well as in-kind contributions such as the value of a building or lease, donated materials, or volunteer time.

PY 09 CAPER ESG # 24 response:

Not applicable.

- 25) State Method of Distribution

- a) States must describe their method of distribution and how it rated and selected its local government agencies and private nonprofit organizations acting as subrecipients.

PY 09 CAPER ESG # 25 response:

Not applicable.

26) Activity and Beneficiary Data

- a) Completion of attached Emergency Shelter Grant Program Performance Chart or other reports showing ESG expenditures by type of activity. Also describe any problems in collecting, reporting, and evaluating the reliability of this information.

PY 09 CAPER ESG # 26a response:

Not applicable.

- b) Homeless Discharge Coordination

- i) As part of the government developing and implementing a homeless discharge coordination policy, ESG homeless prevention funds may be used to assist very-low income individuals and families at risk of becoming homeless after being released from publicly funded institutions such as health care facilities, foster care or other youth facilities, or corrections institutions or programs.
  - ii) Explain how your government is instituting a homeless discharge coordination policy, and how ESG homeless prevention funds are being used in this effort.

PY 09 CAPER ESG # 26b response:

Not applicable. Note: The Housing Network is working on the Plan to end Homeless and the discharge coordination policy for this Region.

## NON-HOMELESS SPECIAL NEEDS

### Non-homeless Special Needs

\*Refer to the Non-homeless Special Needs Table in the Needs.xls workbook or Table 1C.

- 27) Identify actions taken to address special needs of persons that are not homeless but require supportive housing, (including persons with HIV/AIDS and their families).

PY 09 CAPER Non-homeless Special Needs #26 response:

The City of Bloomington is the grantee for a Shelter + Care grant specifically designed to do supportive housing for the clients of Centerstone (formerly the Center for Behavioral Health). HAND also provides TBRA to the Bloomington Housing Authority for households on their waiting list. Many of the organizations that the City funds, as outlined above, provide supportive services to help prevent people from losing their homes.

## COMMUNITY DEVELOPMENT

### Community Development Block Grant

#### 28) Assessment of Relationship of CDBG Funds to Goals and Objectives

- a) Assess use of CDBG funds in relation to the priorities, needs, goals, and specific objectives in the Consolidated Plan, particularly the highest priority activities.

**\*If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)

**\*If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER CDBG Assessment # 28a response:

		Priority Need Level	Amount Served	Amount Expended
	03 Streets	High	1,300 feet	73,784
	03L Sidewalks	High	100 linear feet	\$2,267.45
Public Services	05 Public Services (General)	High	5,521	\$49,018
	05D Youth Services	High	236	\$59,445
	05L Childcare Services	High	82	\$22,164

HAND's primary goal is to expand personal economic development through the stabilization of an individual or family's housing cost by providing stable, affordable long-term housing. HAND's Home Buyer's Club provides education and assistance to people interested in buying a home. HAND's assistance programs make those homes affordable. This fiscal year, HAND will develop the following:

		Priority Need Level	Amount Served	Dollars Expended
	12 Construction of Housing	High	12	\$1,452,794
	13 Direct Homeownership Assist.	High	5	\$25,000
	14A Rehab; Single – Unit Resident.	High	29	\$193,393
	14C Public Housing Modernization	High	40	\$88,783
	16A Residential Historic Preservation	High	Included above	Included above

Notes: 1) HAND recently completed a 12 unit, single site green build housing subdivision on the southwest side of Bloomington. Nine are occupied. Two have pending offers.

2) HAND assisted with Middle Way House to develop six affordable apartments to be used for low income women who have been victims of domestic violence.

In addition to the above, HAND will also help provide stable, affordable housing by assisting the Bloomington Housing Authority to modernize its units, and by providing Tenant-Based Rental Assistance to individuals and families on the Bloomington Housing Authority waiting list.

- b) Evaluate progress made toward meeting goals for providing affordable housing using CDBG funds, including the number and types of households served.

**\*If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)

**\*If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER CDBG Progress Evaluation # 28b response:

Progress was made meeting goals for providing affordable housing. See 1(d) for household served.

- c) Indicate the extent to which CDBG funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity?

PY 09 CAPER CDBG LMI Benefit # 28c response:

Program	% served under 50% AMI
Down Payment & Closing Cost Assistance	50%
Emergency Home Repair	100%
Home Modification for Accessible Living	83.33%
Owner Occupied Rehabilitation	100%
Bloomington Housing Authority Assistance	100%
Habitat	66.66%
Big Brothers/Big Sisters	93.2%
Boys & Girls Club	98%
Community Kitchen	100%
Hoosier Hills Food Bank	96.6%
Middle Way House	100%
Mother Hubbard's Cupboard	96.8%

29) Changes in Program Objectives

- a) Identify the nature of and the reasons for any changes in program objectives and how the jurisdiction would change its program as a result of its experiences.

PY 09 CAPER CDBG #29 response:



We do not anticipate any changes at this time.

30) Assessment of Efforts in Carrying Out Planned Actions

- a) Indicate how grantee pursued all resources indicated in the Consolidated Plan.
- b) Indicate how grantee provided certifications of consistency in a fair and impartial manner.
- c) Indicate how grantee did not hinder Consolidated Plan implementation by action or willful inaction.

PY 09 CAPER CDBG # 30 response:

- a) All resourced outlined in the Consolidated Plan have been pursued.
- b) Certificates of Consistency are signed by the Mayor or his designee after the staff has analyzed if they meet goals outlined in the Consolidated Plan 2005-2010.
- c) The grantee is not hindering Consolidated Plan implementation, but some things have been scaled back due to a reduction in funding sources and an increase in costs.

31) For Funds Not Used for National Objectives

- a) Indicate how use of CDBG funds did not meet national objectives.
- b) Indicate how use of CDBG funds did not comply with overall benefit certification.

PY 09 CAPER CDBG #31 response:

All funds were used to meeting national objectives.

32) Anti-displacement and Relocation – for activities that involve acquisition, rehabilitation or demolition of occupied real property

- a) Describe steps actually taken to minimize the amount of displacement resulting from the CDBG-assisted activities.

PY 09 CAPER CDBG # 32a response:

No activities this conducted this fiscal year resulted in anyone being displaced. Please note that one HAND staff member and two City attorneys attended the Uniform Relocation Training held in May 2008.

- b) Describe steps taken to identify households, businesses, farms or nonprofit organizations that occupied properties subject to the Uniform Relocation Act or Section 104(d) of the Housing and Community Development Act of 1974, as amended, and whether or not they were displaced, and the nature of their needs and preferences.

PY 09 CAPER CDBG # 32b response:

Not applicable.

- c) Describe steps taken to ensure the timely issuance of information notices to displaced households, businesses, farms, or nonprofit organizations.

PY 09 CAPER CDBG # 32c response:

Not applicable.

33) Low/Mod Job Activities – for economic development activities undertaken where jobs were made available but not taken by low- or moderate-income persons

- a) Describe actions taken by grantee and businesses to ensure first consideration was or will be given to low/mod persons.

PY 09 CAPER CDBG # 33a response:

No economic development activities were undertaken using CDBG funds this fiscal year. Other resource such as general fund or Tax Increment Financing funding was utilized to meet this goal.

- b) List by job title of all the permanent jobs created/retained and those that were made available to low/mod persons.

PY 09 CAPER CDBG # 33b response:

Not applicable.

- c) If any of jobs claimed as being available to low/mod persons require special skill, work experience, or education, provide a description of steps being taken or that will be taken to provide such skills, experience, or education.

PY 09 CAPER CDBG # 33c response:

Not applicable.

34) Low/Mod Limited Clientele Activities – for activities not falling within one of the categories of presumed limited clientele low and moderate income benefit

- a) Describe how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of who are low- and moderate-income.

PY 09 CAPER CDBG # 34a response:

Not applicable.

35) Program income received

- a) Detail the amount repaid on each float-funded activity.

PY 09 CAPER CDBG # 35a response:

The City of Bloomington does not do float-funded activities.

- b) Detail all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other.

PY 09 CAPER CDBG # 35b response:

See attached Loan Report.

- c) Detail the amount of income received from the sale of property by parcel.

PY 09 CAPER CDBG # 35c response:

See attached Sales Report.

36) Prior period adjustments – where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:

a) The activity name and number as shown in IDIS;

PY 09 CAPER CDBG # 36a response:

No adjustments were made this period.

b) The program year(s) in which the expenditure(s) for the disallowed activity (ies) was reported;

PY 09 CAPER CDBG # 36b response:

No disallowed activities were reported.

c) The amount returned to line-of-credit or program account; and

PY 09 CAPER CDBG # 36c response:

The City does not have a line-of-credit or program account.

d) Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

PY 09 CAPER CDBG # 36d response:

Not applicable.

37) Loans and other receivables

a) List the principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.

PY 09 CAPER CDBG #37a response:

This city does not have any float-funded activities at this time.

b) List the total number of other loans outstanding and the principal balance owed as of the end of the reporting period.

PY 09 CAPER CDBG #37b response:

See attached loan report.

- c) List separately the total number of outstanding loans that are deferred or forgivable, the principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.

PY 09 CAPER CDBG #37c response:

See attached loan report.

- d) Detail the total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.

PY 09 CAPER CDBG #37d response:

There were no loans in foreclosure or that have been written off as a bad debt this fiscal year.

- e) Provide a List of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.

PY 09 CAPER CDBG #37e response:

The City does not currently have any property that is available for sale that was purchased with CDBG funds.

38) Lump sum agreements

- a) Provide the name of the financial institution.

PY 09 CAPER CDBG #38a response:

Not applicable.

- b) Provide the date the funds were deposited.

PY 09 CAPER CDBG #38b response:

Not applicable.

- c) Provide the date the use of funds commenced.

PY 09 CAPER CDBG #38c response:

Not applicable.

- d) Provide the percentage of funds disbursed within 180 days of deposit in the institution.

PY 09 CAPER CDBG #38d response:

Not applicable.

## NEIGHBORHOOD REVITALIZATION STRATEGY AREA (NRSA)

39) Jurisdictions with HUD-approved neighborhood revitalization strategy must describe progress against benchmarks for the program year.

PY 09 CAPER NRSA # 38 response:

Not applicable.

## HOME/ADDI

### HOME/ American Dream Down Payment Initiative (ADDI)

☐ **NA**

40) Assessment of Relationship of HOME Funds to Goals and Objectives

- a) Assess the use of HOME funds in relation to the priorities, needs, goals, and specific objectives in the strategic plan, particularly the highest priority activities.

***\*If not using the CPMP Tool:*** Use Table 2A, 3B, 2B, 1C, 2C, 3A)

***\*If using the CPMP Tool:*** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER HOME Assessment # 40a response:

All HOME funds are used to meet housing needs as outlined in the Consolidated Plan 2005-2010. As the economy has continued to shift, HAND has used its HOME funds to meet the ever changing needs of the community. For this fiscal year, all HOME funds were expended on high priorities.

- b) Evaluate progress made toward meeting goals for providing affordable housing using HOME funds, including the number and types of households served.

***\*If not using the CPMP Tool:*** Use Table 2A, 3B, 2B, 1C, 2C, 3A)

***\*If using the CPMP Tool:*** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.

PY 09 CAPER HOME Progress Evaluation # 40b response:

The City of Bloomington recently completed a LEED certified affordable housing project on the southwest side of Bloomington utilizing HOME funds. 12 units are completed, nine of which are occupied by low income households. Two of those households were Section 8 homeownership program participants. HAND provided down payment and closing cost assistance to \* households and damage deposit loans to \* households.

- c) Indicate the extent to which HOME funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons.

PY 09 CAPER HOME # 40c response:

HOME			
Habitat for Humanity	51-80%	6	White
	0-30%	5	White
Acquisition/Rehab	61-80%	1	White
TBRA	0-30%	2	White
	0-30%	1	Black
	0-30%	2	White
	0-30%	1	White
	0-30%	4	White
	0-30%	3	White
	0-30%	3	White
	0-30%	1	Black
	0-30%	2	White

41)HOME Match Report

- a) Use HOME Match Report HUD-40108-A to report on match contributions for the period covered by the Consolidated Plan program year.

PY 09 CAPER HOME Rental # 41 response:

See attached HOME Match Report noted as Exhibit A.

42)HOME MBE and WBE Report, Use Part III of HUD Form 40107 to report contracts and subcontracts with Minority Business Enterprises (MBEs) and Women's Business Enterprises (WBEs).

PY 09 CAPER HOME Rental # 42 response:

See attached HOME MBE and WBE Report noted as Exhibit B.

43)Assessments

- a) Detail results of on-site inspections of rental housing.

PY 09 CAPER HOME Rental # 43a response:

Bloomington Municipal Code Title 16 requires that all rental properties located within the city limits be registered and comply with the standards set forth in the code. Units that are funded with HOME are cycled per HUD requirements but to the standards outlined in Bloomington Municipal Code Title 16 which are more stringent than the Housing Quality Standards outlined by HUD. All HOME funded units are currently in compliance.

- b) Describe the HOME jurisdiction's affirmative marketing actions.

PY 09 CAPER HOME # 43b response:

HAND did the following marketing/outreach efforts this fiscal year:

June 2009	Spanish Home Buyer's Club
June 2009	Budget & Credit Seminar for Martha's House

June 2009	Blooming Neighborhoods – program information
July 2009	CDBG display in atrium window @ City Hall
July 2009	Budget class for Bloomington Housing Authority
July 2009	Con Plan focus groups: Affordable Housing – July 21 <sup>st</sup> Social Services – July 28 <sup>th</sup> Economic Development – August 4 <sup>th</sup> Internal City Departments – August 7 <sup>th</sup> Homeless Issues – August 11 <sup>th</sup> Community Development – August 20 <sup>th</sup>
August 2009	R101 – Renting in Bloomington
September 2009	Home Buyer’s Club
September 2009	Meet the Grantmakers @ Monroe County Library (panelist)
November 2009	R101 – Renting in Bloomington
January 2010	CDBG Public Hearing for Physical Improvements
January 2010	CDBG Public Hearing for Social Services
February 2010	Understanding Credit @ Monroe County United Ministries
February 2010	Predatory Lending for Habitat for Humanity
February 2010	Home Buyer’s Club
February 2010	Housing Programs for Broadview Neighborhood
April 2010	Financial Fitness @ Monroe County United Ministries
April 2010	Home Buyer’s Club
May 2010	Housing Programs @ Senior Expo
May 2010	Home Buyer’s Club

- c) Describe outreach to minority and women owned businesses.

PY 07 CAPER HOME/ADDI # 43c response:

HAND regularly talks to parties interested in providing services to the City. This past fiscal year, we worked with two women owned businesses on EverGreen Village; Cassady Electric and Strauser Construction.

## HOPWA

### Specific HOPWA Objectives

#### 44) Assessment of Relationship of HOPWA Funds to Goals and Objectives.

- a) Assess the use of HOPWA funds in relation to the priorities, needs, goals, and specific objectives in the strategic plan, particularly the highest priority activities.

**\*If not using the CPMP Tool:** Use Table 2A, 1C, 2C, 3A)

**\*If using the CPMP Tool:** Use Need/Housings, Summary of Specific Annual Objectives.

PY 08 CAPER Specific HOPWA Objectives # 44a response:

Not applicable.

- b) Evaluate progress made towards meeting the goals of providing affordable housing using HOPWA funds, including the number and types of households served.

**\*If not using the CPMP Tool:** Use Table 2A, 1C, 2C, 3A)

**\*If using the CPMP Tool:** Use Need/Housings, Summary of Specific Annual Objectives.

PY 09 CAPER Specific HOPWA Objectives # 44b response:  
07

*To report progress under the general and HOPWA specific requirements, the grantee may integrate the HOPWA elements in their standard CAPER report or establish a HOPWA-specific narrative by completing the following information. IDIS Report PR80 has useful financial and accomplishments information for end of year reporting.*

Not applicable.

## **HOPWA EXECUTIVE SUMMARY**

- 45) Provide an executive summary (1-3 pages) and a specific objectives narrative which address the following:
- a) Grantee and Community Overview.
    - i) A brief description of the grant organization, the area of service, the name of the program contact(s), and a broad overview of the range/type of housing activities, along with information on each sponsor by name, main project site by zip code and related organization information.
  - b) Annual Performance under the Action Plan
    - i) Report on the actions taken during the year that addressed the special needs of persons who are not homeless but require supportive housing, and assistance for persons who are homeless.
    - ii) Evaluate the progress in meeting the project's objectives for providing affordable housing, including a comparison of actual outputs and outcomes to proposed goals and progress made on the other planned actions indicated in the strategic and action plans. The evaluation can address any related program adjustments or future plans.
    - iii) Include any assessment of client outcomes for achieving housing stability, reduced risks of homelessness and improved access to care.
    - iv) Report on the use of committed leveraging from other public and private resources that helped to address needs identified in the plan. Report the number of stewardship units of housing which have been created through acquisition, rehabilitation or new construction with any HOPWA funds.
    - v) Describe any other accomplishments recognized in the community due to the use of HOPWA funds, including any projects in developmental stages that are not operational.
    - vi) Provide an analysis of the extent to which HOPWA funds were distributed among different categories of housing needs consistent with the geographic distribution plans identified in its approved Strategic Plan.



- c) Barriers or Trends Overview
  - i) Describe any barriers (including non-regulatory) encountered, actions in response to barriers, and recommendations for program improvement;
  - ii) Describe any expected trends facing the community in meeting the needs of persons with HIV/AIDS, and provide any other information important in providing services to persons with HIV/AIDS.
  - iii) Note any evaluations, studies, or other assessments of the HOPWA program available to the public.
- d) Project Accomplishment Data:
  - i) Complete and submit CAPER Performance Chart 1 Planned Goals and Chart 2 Actual Performance;
  - ii) Complete and submit CAPER Performance Chart 3 for Housing Stability Outcomes, HOPWA Outcomes on Access to Care and Support in conjunction with HOPWA-funded Housing assistance, Monthly Household Income in conjunction with HOPWA-funded Housing Assistance, and HOPWA Outcomes on Access to Care and Support not in conjunction with HOPWA-funded Housing Assistance.

Not applicable.

## OTHER NARRATIVE

Include any CAPER information that was not covered by narratives in any other section.

PY 09 CAPER Other Narrative response: